



Summer Library Program Grant Management

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MOSL LSTA Website

- All support forms are linked in the grant management system to the LSTA grants website
 - Grant folder Content list
 - Financials Report (Spreadsheet)
 - Survey Guidelines
 - Summer Library Program Upload
 - Procurement Certification
- <https://www.sos.mo.gov/library/development/lstagrants>

Session Objectives


1. Grant management basics
2. LSTA reporting
3. Report Requirements
4. Prior approvals and amendments
5. Grant monitoring
6. Best practices



Accepting the Grant

- Login to the Online Grant Management System
- A copy of the signed grant acceptance form is retained in the online system

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
LSTA Grant Acceptance		Overall Award		Complete	View
Interim Report One		Overall Award		Complete	View
Interim Report Two		Overall Award	01/29/2021 11:45 PM CST	Assigned	Edit
Final Report		Overall Award	06/30/2021 11:45 PM CDT	Assigned	

Documents uploaded by Administrator

DESCRIPTION	FILE
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Award and Forms Packets

- The award packet is uploaded into the documents tab in the online grant management system.
- It includes:
 - Budget memo
 - Payment requests



Grant Timeline

- Begins: February 1, 2022
- Interim Report: May 1, 2022
- Ends: August 15, 2022
- Final Report Due: September 15, 2022



Promotional Efforts

- **Acknowledgement Text:**

“This project is supported by the Institute of Museum and Library Services under the provisions of the Library Services and Technology Act as administered by the Missouri State Library, a division of the Office of the Secretary of State.”

- **Social Media Funding Acknowledgement:**

- use the hashtag #IMLSGrant

- use @US_IMLS

”Library was awarded a grant from @US_IMLS! #IMLSGrant”

- **See the IMLS Communications Kit at**
<https://www.imls.gov/grants/grant-recipients/grantee-communications-kit>

REQUIRED

When to Survey Participants

○ Survey Patrons:

- When project has an instructional program involved

○ Survey Staff:

- When project has a staff training component
- When the project involves content acquisition
- When the project involves educational software
- When the project involves planning and/or evaluation

Surveys: Program Vs Presentation

❖ Instructional *Program*

- Active user engagement
- Typically has hands-on learning experiences
- Patron survey required

❖ Instructional *Presentation*

- Passive user engagement
- Low/no interactivity beyond Q/A
- Does NOT require a patron survey

Aggregate Survey Results

Total the Responses Received
into a Single Chart

		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total Number of Responses
1	I learned something by participating in this library activity.	0	1	2	10	15	28

Program Upload Sheet

	A	B	C	D	E	F	G
1	Educational Programs						
2	Title of Program	Brief Description of Program	Length of each session in minutes	Synchronous Sessions	Asynchronous Sessions	Attendances	Age Group
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23	Total	0		0	0	0	
24							
25							
26						Early Literacy	0
27						Children	0
28						Young Adult	0
29						Adult	0
30						General Interest	0
31							
32							
33							

How to Report Programs of a Similar Nature

Group into a single entry

Title of Program	Fun with Flags!
Program Location	In Library
Program Length	Average of 50 minutes
Number of Programs	2: Adults and Seniors
Number of Sessions	10 (five of each)
Total Attendance	57
Brief Description	Fun with Flags is on the topic of vexillology, the study of flags. Includes a behind-the-scenes retrospective (and a behind the behind-the-scenes retrospective retrospective)

Payment Requests

- **Payment Request Forms**

- First Payment

- Full payment amount
 - Items must be encumbered before requesting a payment

- Final Payment

- Enter exact final payment amount
 - Submit with final report



Budget Categories

- Personnel
- Services
- Supplies
- Indirect Cost Rate

Name of Library:	\$	-	
Name of Project:			
Budget Category	LSTA Amount Approved	LSTA Amount Spent to Date	LSTA Unspent Balance
Personnel		\$0.00	\$0.00
Supplies		\$0.00	\$0.00
Services		\$0.00	\$0.00
Travel		\$0.00	\$0.00
Equipment		\$0.00	\$0.00
Consultant Fees		\$0.00	\$0.00
Indirect Cost		\$0.00	\$0.00
TOTAL	\$0.00	\$0.00	\$0.00

Financial Reporting

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	LSTA GRANT PAYMENT SUMMARY												
2													
3		Library Name: \$	-										
4		Project Number: \$	-										
5													
6	For each invoice, list the invoice number, vendor/payee, date, quantity, and a brief description of the items ordered and received during the grant period. Breakout the cost share by LSTA and Local funds. When finished, upload this form as an attachment in the grant management system. Do NOT include costs that are ineligible for LSTA funding, such as prizes, incentives, decor, etc. even if they are funded locally. Remember to submit a Procurement Certification form if you purchased an item or set of the <u>same</u> items that exceeded \$3,000 in the aggregate.												
7													
8		SUPPLIES BUDGET CATEGORY	Invoice Number	Vendor/Payee	Date	Quantity	Description of item or service				LSTA Funds	Local Funds	Total
9		SUPPLIES											\$ -
10													\$ -
11													\$ -
12													\$ -
13													\$ -
14													\$ -
15													\$ -
16													\$ -
17													\$ -
18													\$ -
19													\$ -
20													\$ -
21													\$ -
22													\$ -
23													\$ -
24													\$ -
25													\$ -
26													\$ -
27													\$ -
28													\$ -
29												\$ -	
30												\$ -	
31												\$ -	
32											\$ -	\$ -	\$ -
33													
34													
35													
36													

Instructions

Personnel

Supplies

Services

Travel

Equipment

Consultant Fees

Indirect Cost

Budget Chart



Financial Reporting

❑ The Final Report Tab

- ❑ Enter LSTA Award amounts in the LSTA Award column
- ❑ Everything else auto-populates

❑ Remember:

- List invoices separately, if space allows
- Retain all original invoices for your grant files
- Include both local and LSTA expenditures on the Budget tab
- Enter by budget category

INSTRUCTIONS LSTA BUDGET CHART			
<i>Please complete the chart below. Use only LSTA funds. Use exact figures. Do not round.</i>			
LSTA Amount Approved — This is the LSTA amount approved as listed in the budget memo in the grant award packet. Do not change any of these figures. Changes can only be made after an amendment has been fully executed.			
Total LSTA Amount Spent to Date —List total amount of funds spent to date in each category. For this report, the amount spent this period should equal the amount spent to date.			
LSTA Unspent Balance — This is the LSTA Amount Approved minus the LSTA Amount Spent to Date. If this is a final report, you will subtract this amount from the final payment request.			
Name of Library:	\$	-	
Name of Project:			
Budget Category	LSTA Amount Approved	LSTA Amount Spent to Date	LSTA Unspent Balance
Personnel		\$0.00	\$0.00
Supplies		\$0.00	\$0.00
Services		\$0.00	\$0.00
Travel		\$0.00	\$0.00
Equipment		\$0.00	\$0.00
Consultant Fees		\$0.00	\$0.00
Indirect Cost		\$0.00	\$0.00
TOTAL	\$0.00	\$0.00	\$0.00

Instructions Personnel Supplies Services Travel Equipment Consultant Fees Indirect Cost B

Personnel

Payment Summary – Reporting personnel costs

1. Personnel in Category
2. Services performed in Description
3. Hours worked in Quantity
4. Library position in Invoice
5. Dates of service span in Date
6. Name of staff as Vendor
7. LSTA portion of total in LSTA Funds
8. Local match portion of total in Local Funds
9. Wages paid in Total

Indirect Cost Rate

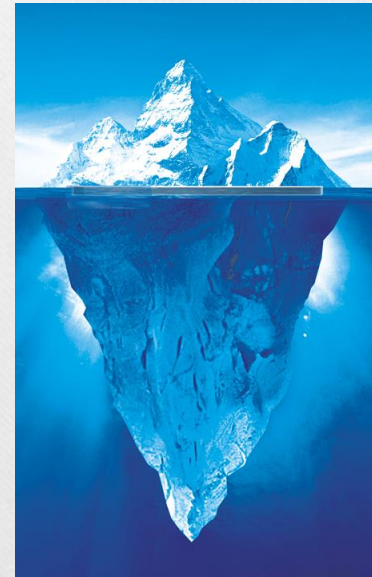
- Is not assignable or itemized to a specific cost in the narrative report or the listing of costs
- Is 10% of the actual funds expended, excluding Equipment
- Must be claimed on the original application and is listed on the budget memo chart in the award packet.

Procurement Certification

- **Procurement Certification**
 - Needed when the cost of an item or set of items meets your institution's large purchase criteria
 - **State Guidelines:** Over \$3,000 in the aggregate

Narrative Report Requirements

- Activities
- Project Changes and Additions
- Project Promotion
- Project Partners



Report Requirements

Narrative Report

- Outputs
 - Library Materials
 - Interactive Instructional Programs
 - Instructional Presentations/Performances
- Project Data
 - 2020/2021/2022 Statistical Comparison
- Outcomes
 - Methods Used
 - Changes in Knowledge, Skills, etc.
 - Survey Results from Programs

Report Requirements

Narrative Report

- Importance of Findings
- Lessons Learned
- Project Promotion
- Project Partners
- Project Continuance
- Effort Level
- Project Scope
- Other

Prior Approvals

- If you did not have complete estimated costs for project expenses, be sure you have these items reviewed and approved before committing LSTA funds to pay for the item(s).
- Your survey tools must be reviewed and approved before you use them



Request for Amendment

A formal amendment is needed for:

- Budget changes
 - Moving over \$1,000 between existing budget categories
 - Moving any funds into a budget category that is not in the grant award
 - Needing to use LSTA funds for items not specifically listed in your grant application
 - Needing additional funds of \$500 or more

Request for Amendment

- ❑ A formal amendment may also be needed for:
 - Programmatic changes
- ❑ No amendment needed, but do let us know about:
 - Changes in key personnel
 - Changes in subcontractor
- ❑ Must be submitted at least 3 weeks before the end of the grant period
- ❑ Must be fully executed before placing any orders, etc.

Grant Monitoring

Reports

Emails

Phone Calls

Onsite Visits

Zoom Calls



Best Practices

- Create a file folder for all paperwork related to the grant
- Keep track of your budget on an ongoing basis
- Know what you need to count and why
- Monitor changes in your technology users
- Periodically review your application



Contents of Grant File

- Original, signed application
- Signed copy of the grant agreement form
- Signed copy of the grant acceptance form
- Payment requests
- Interim and final reports
- Invoices
- Market analysis documentation
- Bid process documentation
- Promotional efforts

Best Practices

- Watch for project changes
- Keep all original invoices and timesheets
- Tell the whole story of the grant on the reports
- File all reports on or before the deadline

Best Practices



Grant Writing and Management Manual

[http://s1.sos.mo.gov/cmsimages/LibraryGrantsTemp/Grants
Manual.pdf](http://s1.sos.mo.gov/cmsimages/LibraryGrantsTemp/GrantsManual.pdf)



Questions



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